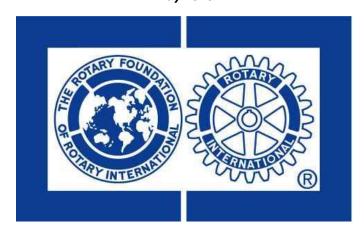


READY RECKNOR

May 2016



Helps you to understand, apply, implement, report and close Global Grant Project
Includes customized District Guidelines for RID 3131

Compiled & Created by

Foundation Avenue Global Grant Team RID 3131

Rtn Shirish Karnik, Director, Rtn Vinay Sathe, Co-Director, Rtn Parag Mulye, Co-Director

Photo Message from DGE Prashant Deshmukh

XXXXX vvvvvv afsasfasdfsa

dfsdfsdfsdfsdf

Best Regards

Prashant Deshmukh

District Governor Elect (2016-17)



Message from DRFCE Deepak Shikarpur

The Rotary Foundation is a not-for-profit corporation that supports the efforts of Rotary International to achieve world understanding and peace through international humanitarian, educational, and cultural exchange programs

Rotary Foundation is completing 100 years soon. Best way to celebrate TRF Centennial is to undertake mega service projects and benefit community. Global and District grants are unique methods to multiply our funds and create a multiplier effect.

We need to be aware on how to participate in the unique gift . Unfortunately, 75% clubs don't participate in grants either due to lack of awareness or interest. RID 3131 is now trying several ways to increase the spread. TRF grants committee (2016-17) is planning to release a booklet "A Ready Reckoner for Global Grants". This may be first attempt from our district to create a customized booklet on Global Grants.

I wish all the best for the same and whole heartedly appreciate efforts taken by Rtn Vinay Sathe, Parag Mulye and Grant chair Shirish karnik for creating such a wonderful document.

Best Regards

Dr Deepak Shikarpur

District Rotary Foundation Coordinator (2016-19)

Table of Contents

INTRODUCTION	4
GLOBAL GRANT REQUIREMENTS	5
MAKE A SUSTAINABLE IMPACT	6
MAKING AN IMPACT IN OUR AREAS OF FOCUS	7
YOUR COMMUNITY'S NEEDS AND STRENGTHS	10
PARTNER TO MAXIMIZE YOUR IMPACT	11
PLAN YOUR GLOBAL GRANT FUNDED PROJECT	12
APPLY FOR A GLOBAL GRANT	17
IMPLEMENT, MONITOR, AND EVALUATE YOUR PROJECT	19
REPORT YOUR PROGRESS AND OUTCOME	23
PUBLIC IMAGE ENHANCEMENT	24
EXTRA SUPPORT	26

INTRODUCTION

As Rotary's founder Paul Harris had stated only thing that will remain constant in Rotary will be CHANGE! Grant processes and practices too have undergone changes to address the newer challenges local communities have been facing.

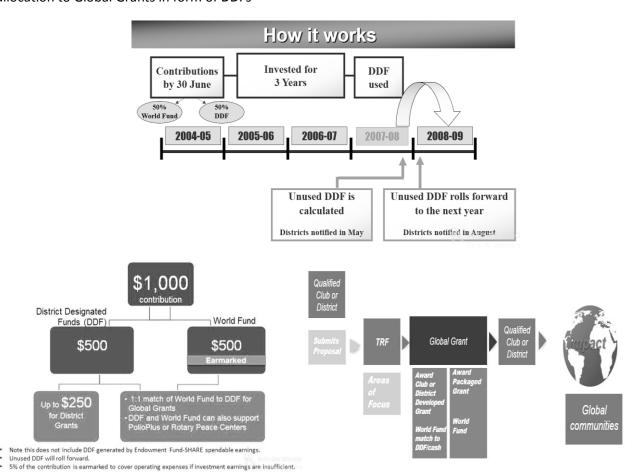
While reaching near-success stage in Polio Drives, TRF has embedded in the Grant application, evaluation and management process the following -

- Sustained Project Activities
- Local community participation
- Collaborative approach to strike multiple partnerships (beyond Rotary World)
- Public Image building
- Transparency thru' on-Line application, approvals, identifying measurable outcomes & progress reporting and audit

Rotary club members contribute our skills, expertise, and financial support to promote peace, fight disease, provide clean water, save mothers and children, support education, and grow local economies.

Rotary's global grants support these efforts in communities worldwide.

Broadly TRF funding comes from funds contributed by Rotary Clubs & Members over number of years. A system of SHARE is followed where at the end of 3 years contributed funds are made available to district for allocation to Global Grants in form of DDFs



GLOBAL GRANT REQUIREMENTS

Rotary members must be actively involved in all global grants, and all projects must comply with the Terms and Conditions for Rotary Foundation District Grants and Global Grants.

YOUR PROJECT MUST:

- Have a long-term, sustainable impact
- Include activities that clearly fit into one of Rotary's areas of focus
- Invest at least \$30,000 within a community
- · Address an important need identified by the community itself
- Strengthen the community's capacity to meet its own needs

YOU MUST:

- Apply for a grant through Rotary.org
- Actively involve the benefiting community in the project
- Partner with a club in another country
- Qualify your club for global grants every year
- Act as primary sponsor of no more than 10 active global grants at a time
- Develop a project plan that includes a budget and a financial management plan
- Measure progress toward the outcome
- Stay up-to-date in reporting for all active grants

ELIGIBLE ACTIVITIES

Global grants support international activities within Rotary's areas of focus:

- Humanitarian projects provide sustainable, measurable outcomes that address real
- community needs.
- Vocational training builds skills within a community through targeted educational programs or by supporting teams of professionals who travel abroad to build their own capacity or the capacity of the community they visit. Learn more about vocational training teams.
- Scholarships fund international graduate-level study by people seeking a career within an area of focus. Read the Global Grant Scholarships Supplement for more information.

CLUB QUALIFICATION

At Rotary, we want every grant to demonstrate that we're ethical, responsible leaders who make every donation count. Rotary's commitment to sound financial management makes it easier for all of us to find donors, partners, and communities that are ready to work with us.

Through our qualification process, your club agrees to follow our financial and grant management practices and contributes to Rotary's reputation as a global leader in health, peacebuilding, and international development. Qualifying your club for global grants takes three steps:

1 Attend a grant management seminar. Rotary members involved in grant-funded projects should participate in a grant management seminar in the district. If the members involved in the project cannot attend, your club can send its president-elect or another member. A minimum of one representative from your club must attend the grant management seminar.

2 Complete the club memorandum of understanding (MOU). The MOU is an agreement between your club and district that outlines the Foundation's minimum requirements for managing grants. Your club president and president-elect review the MOU, sign it, and submit it to your district.

3 Agree to any additional qualification requirements set by your district. Rotary's policies establish a shared standard for all Rotary clubs. Your district might have additional requirements.

Complete these steps annually to stay qualified.

MAKE A SUSTAINABLE IMPACT

At Rotary, we want our projects to have a lasting impact, long after the vocational training team goes home, the scholar finishes her studies, and your club has submitted its final report on your project to the Foundation. **SUSTAINABILITY**

Sustainability means different things to different organizations. For Rotary, sustainability means providing long-term solutions to community problems that community members themselves can support after grant funding ends.

How can you make your project sustainable? Be sure to:

- Start with the community. Host sponsors should work with members of the benefiting community to
 identify a need and develop a solution that builds on community strengths and aligns with local values and
 culture.
- Encourage local ownership. It's a true sign of a project's success when community members embrace the project as their own. Empowering community members to assess their needs and plan projects that address them leads to the most effective projects and the most sustainable outcomes. Identify key community members who can help pioneer lasting improvements.
- Provide training. A project's success depends on people. By providing training, education, and community outreach, you strengthen beneficiaries' ability to meet project objectives. Confirm that a plan is in place to transfer knowledge to new beneficiaries. Collaborate with local organizations to provide this training.
- Buy local. Purchase equipment and technology from local sources whenever possible. Make sure that spare parts are available locally, too. Build capacity so that community members can operate, maintain, and repair equipment on their own. Compensate your project's vendors appropriately so they have an incentive to continue providing supplies.
- Find local funding. Getting funding from local governments, hospitals, companies, and other organizations integrates your project into the local community and supports your project's long-term success.
- Measure your success. First, gather data before you begin the project to determine where you are starting
 from. Include clear and measurable outcomes in your project plan, and decide how you'll collect data
 throughout your project and afterward. Maintaining a strong relationship with the community can help
 you collect data and also address any issues that the data bring to light.
- Global grants require these practices. In your application, you'll explain how your project will include each of them. For examples of projects that show these sustainability practices in action, take the Rotary Grants: Building a Global Grant course on Rotary's Learning Center. You can also contact your regional grants officer to discuss how you can incorporate these practices into your project.

Consider sponsoring a Rotary Community Corps, a team of community volunteers who advise on and assist with the project. They can also build capacity within the community and oversee the project's continuation after the grant is complete.



MAKING AN IMPACT IN OUR AREAS OF FOCUS

The world has no shortage of problems. To focus Rotary clubs' efforts, The Rotary Foundation has identified areas where Rotary can contribute to lasting change. Here's how you can get started.

First, choose at least one area of focus that you want to work in for the benefiting community. These specific causes help us align our local work and maximize our global impact.

- 1. Promoting peace
- 2. Fighting disease
- 3. Providing clean water
- 4. Saving mothers and children
- 5. Supporting education
- Growing local economies

Then consider setting a high-level goal within the area you've chosen, thinking about the impact you want to make, not necessarily the activity that a global grant would fund. For example, to support education, we need to reduce gender disparity in education in our community. Or, to save mothers and children, we need to make sure that more women can deliver their babies safely.

Last, choose a project that will achieve the goal. Read the Areas of Focus Policy Statements for detailed information about eligible global grant activities and outcomes that fall within each area. Each policy statement includes:

- The goals Rotary hopes to achieve in the area
- Activities that are eligible for grants and within the scope of the area
- Elements that are needed to implement successful grants in the area

Use this as your guide for deciding what activity to use to achieve your high-level goal. For example, to save mothers and children, your club will train doctors and nurses at the local hospital so that more expectant mothers can have safe deliveries. Or, to support education, your club and local leaders will reduce gender disparity in your community by hosting a series of forums for parents on the importance of girls' education and will provide new facilities and resources for girls at a local school.

Learn more about each area of focus by taking the Rotary's Areas of Focus course in Rotary's Learning Center. You can also read the Rotary's Areas of Focus guide for more information about eligible global grant activities that fall within each area.

AREAS OF FOCUS



Sample list of Projects which fall in above areas of focus is tabulated below....

TRF MISSION	The mission of the	The mission of the Rotary Foundation is to enable Rotarians to advance world understanding, goodwill and peace through the improvement of health, the support of education, and the alleviation of poverty.	to enable Rotarians to ealth, the support of e	ary Foundation is to enable Rotarians to advance world understanding, goodwill improvement of health, the support of education, and the alleviation of poverty.	anding, goodwill and printion of poverty.	peace through the
	3	ಿಕಿ	***	[F	(E)	
AREAS OF FOCUS*	Peace and Conflict Prevention/ Resolution	Disease Prevention and Treatment	Water and Sanitation	Maternal and Child Health	Basic Education and Literacy	Economic and Community Development
STATEMENT OF PURPOSE	The Rotary Foundation promotes the practice of peace and conflict prevention/resolution by:	The Rotary Foundation reduces the causes and effects of disease by:	The Rotary Foundation ensures that people have sustainable access to water and sanitation by:	The Rotary Foundation improves the lives of mothers and their children by:	The Rotary Foundation promotes education and literacy for all by:	The Rotary Foundation invests in people to create measurable and enduring economic improvement in their lives and communities by:
GOALS	Strengthening local peace efforts Training local leaders to prevent and mediate conflict Supporting long-term peace building in areas affected by conflict Assisting vulnerable populations affected by conflict. Supporting studies children and youth Supporting studies related to peace and conflict resolution	Improving the capacity of local health care professionals Combating the spread of HIV/AIDS, malaria, and other major diseases Enhancing the health infrastructure of local communities Educating and mobilizing communities to help prevent the spread of major diseases to help diseases to help of major diseases related to disease prevention and treatment	Increasing equitable community access to safe drinking water and basic sanitation Strengthening the ability of communities to develop and maintain sustainable water and sanitation systems Educating communities about safe water, sanitation, and hygiene Supporting studies related to water and sanitation	Reducing the mortality rate for children under the age of five Reducing the maternal mortality rate Improving access to essential medical services and trained health care providers for mothers and their children Supporting studies related to maternal and child health	Ensuring that children have access to quality basic education Reducing gender disparity in education Increasing adult literacy Strengthening the capacity of communities to support basic education and literacy Supporting studies related to basic education and literacy	Strengthening the development of local entrepreneurs and community leaders, particularly women, in impoverished communities Developing opportunities for decent and productive work, particularly for youth Building the capacity of local organizations and community networks to support economic development Supporting studies related to economic and community

*Under the Future Vision Plan, the areas of focus relate directly to global grants.

YOUR COMMUNITY'S NEEDS AND STRENGTHS

Making sure that projects meet the local community's needs and build on its strengths makes them more likely to be supported and continued by local community members after the grant has ended. It also ensures that the projects will work within the local culture and the community, and builds ownership from the beginning.

Since local participation and support is so important to a project's success, Rotary asks local sponsors to conduct a community assessment as the first step. This establishes that the project is being driven by data from the beginning, which gives it credibility. It is also one of Rotary's criteria for a project's sustainability. To get a thorough understanding of an issue, involve different groups of people — men and women, elders and youths, leaders and marginalized community members, traditional healers and experienced hospital administrators. Listening to these diverse perspectives helps your club learn about a community, recognize its strengths, and understand how you can use those strengths to address a significant need related to one of Rotary's areas of focus.

Here's how you can get started:

- Decide how you want to conduct an assessment. Community Assessment Tools offers instructions for several types of assessments.
- You can use district grant funds to conduct a community assessment. Ask your district leaders if funds are available.
- Then, based on the assessment's results, determine which needs you are able to address through a global grant. You may have to consider scope and budget. Once you've identified a possible project, make sure that:
 - o It falls within Rotary's global grant guidelines
 - o It's technically feasible
 - You and your partner club are qualified to address this need through your collective expertise and resources
 - o The issues aren't already being addressed by another organization

Once you've completed the assessment and chosen a suitable goal and a project that will achieve it, you've laid the groundwork for making lasting improvements in the lives of community members.

PARTNER TO MAXIMIZE YOUR IMPACT

PARTNERSHIP REQUIREMENTS

To apply for a global grant, two or more Rotary clubs must work together.

- The host sponsor is the partner in or near the community that's implementing the project.
- The international sponsor works with the host sponsor, but it's located outside of the host sponsor's country.

All sponsors must meet global grant requirements and eligibility. Contact a prospective sponsor club's district Rotary Foundation chair to find out whether it's qualified.

SPONSOR ROLES Host and international sponsors have different responsibilities. However, the roles of each sponsor also depend on the clubs involved, the community's strengths, and the nature of the project. As in all good relationships, communication is the key.

Host sponsor

- Initiates the project
- Conducts a community assessment
- · Manages project implementation and budget
- Provides local assistance and support to vocational training teams and scholars during their time abroad
- Receives project funds

International sponsor

- Provides financial assistance, technical support, and other guidance
- Performs project tasks that can be done remotely, as well as participating in service during site visits
- Prepares any vocational training teams or scholars for travel and study abroad

Both sponsors

- Must be qualified to participate in a global grant
- Develop a project plan
- Have project committees that collaborate with each other
- Partner with a cooperating organization (a nongovernmental organization, community group, or government entity) if needed

COOPERATING ORGANIZATIONS

Collaborating with another organization can enhance the quality and effectiveness of your project. A cooperating organization can provide technical expertise, advocacy, training, education, or other support. If you work with a cooperating organization, both clubs and the organization must complete a cooperating organization memorandum of understanding before beginning your project. Although other organizations and volunteers may play a large role, the project sponsors are ultimately responsible for the outcome of a project.

Steps for finding International Partners

Prepare an impressive Single Page brief about the proposed project highlighting Area of Focus, Number of Beneficiaries, Cost of Project, Implementation Period, Sustenance measures. State clearly your club's expectation from International Partner / Sponsoring Club & District. Mention Single Point of Contact.

- 1. List your personal overseas contacts and connect thru these to reach Rotary Clubs from their areas
- 2. Use Linked-In, Facebook

- 3. Attend International Conference, Assembly, Seminars to meet Rotarians from other countries
- 4. Send a mail addressed personally to each DRFCs/ DRFCEs of Districts developed / affluent countries
- 5. Use Matching Grant (http://www.matchinggrants.org/) website to upload your project. *Presently it has 349 Projects with USD 29,811,510 budget.*



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G-300		DIAZII	São penio do Sui	4000	Sao delito do Sui	3131	
G-381	Operation Vision	India	Kolkata	3291	Central Calcutta	3131	,
G-379	Mobile Oral Cancer & Cervical	India	Wadakanchery	3201	Wadakanchery	\$62,295	Need \$14,764
G-377	7 Sanitation for Health	India	Kolkata	3291	Central Calcutta	\$45,000	Need \$13,334
G-360	INPETU III. Health prevention.	Ecuador	Guayaquil	4400	Guayaquil	\$81,885	Need \$54,120
G-358	REGULAR ICU Ventilator,	Turkey	Adana	2440	Bodrum	\$52,000	Fully Pledged
G-350	Education Prog in 100 School	India	Mumbai	3140	Borivli	\$120,000	Need \$70,000
G-339	Water Harvesting Project	Uganda	Jinja	9211	Source of the Nile	\$67,251	Application Sent
G-328	Rural Poverty Alleviation	Uganda	Kanungu District	9211	Kihihi	\$199,500	Need \$133,000
G-326	Capacity Bulding For Vocationa	Uganda	Kanungu District	9211	Kihihi	\$52,395	Need \$34,930
G-324	Functional Literacy Project	Uganda	Kihihi, Kanungu District	9211	Kihihi	\$175,000	Need \$116,667
G-222	2 Kannabulemu Water Project	Uganda	Rakai-Southern Uganda	9211	Rubaga	\$62,892	Need \$41,928
G-199	Thalassaemia Prevention	Indonesia	Indonesia	3420	Semarang Kunthi	\$40,000	Need \$23,334
G-163	B Deaf Education & Development	Kenya	Karen, Nairobi	9212	Karen-Nairobi	\$168,848	Need \$110,232
G-161	Adopt a Village: Nkaimurunya-G	Kenya	Nairobi	9212	Karen-Nairobi	\$33,000	Need \$21,667
G-160	E/Ravine Girls -Water Project	Kenya	Eldama Ravine	9212	Nakuru-The Great Rift Valley	\$89,000	Need \$59,234
G-119	Provision of Water Harvesting	Uganda	East Africa	9211	Bukoto	\$48,630	Need \$32,270
G-62	Adopt A Village Lwankoni	Uganda	Kalisizo	9211	Kalisizo	\$65,098	Need \$43,399

349 projects, \$29,811,530 total budget

PLAN YOUR GLOBAL GRANT FUNDED PROJECT

A thorough project plan sets your project up for success. Clearly assign responsibilities. Collect baseline data and decide how you'll measure the impact of your project. Create a realistic budget.

Develop a Project Plan

Collaboration is essential to developing your project plan. The sponsoring clubs should work together and agree on how to manage each part of the project and how to follow Rotary's global grant guidelines. At the very least, your plan should document:

- The impact you wish to have on the community
- Measurable goals and outcomes of the project
- Actions needed to implement each step of the project
- Assignment of responsibilities so that all work is covered
- Ongoing monitoring and data collection in the benefiting community
- Possible alternative approaches if activities do not yield the desired impact

Involve community members in the planning process. They can create the project plan with you or review it and provide feedback. The most successful plans allow Rotarians and community members to take action together. That collaboration — and the active involvement of Rotarians — should be clearly visible to anyone who sees your project plan.

Create a timeline

With so many tasks and responsibilities to keep in mind, a timeline helps you make sure that everything is done in a timely manner and no tasks are forgotten. Think about how much time is needed for each step of your project's planning, implementation, and follow-up. Include events and tasks such as:

- Community assessment
- Project committee meetings
- Training
- Major meetings with the benefiting community and cooperating organizations
- Follow-up on meetings, conversations, and agreements
- Scheduled communications to sponsors, beneficiaries, cooperating organizations, and any other stakeholders
- Project implementation milestones and benchmarks
- Ongoing monitoring throughout the project
- Evaluation in the middle and at the end of the project

Work as a team

The host and international sponsors each have a project committee of at least three Rotary members. Having a project committee ensures that you have team support of your project. You all know the details of the project. You make decisions together. And you make sure you're meeting your goals and following your budget.

Each sponsor designates one primary contact to be responsible for all grant-related correspondence with Rotary. Also make a communication plan to keep your clubs informed. Ultimately, clubs, not individuals, are responsible for the outcome of a project.

Plan for continuity

Every Rotary year, your club's leadership changes. When you form your committee, identify leaders who are committed to the project and expect to be able to stay involved through the life of the grant. At times, project committee members become unable to serve, so establish a process for replacing them if necessary. If a sponsor club designates its club president as a primary contact, ask him or her to serve on the project committee.

Decide who will do what

Now that you have your project leaders in place, divide the key tasks from the project plan among them and others. Assign them to members of your team, cooperating organizations, community members, and others. For instance, if your plan includes managing local volunteers, make someone responsible for finding volunteers, greeting them at the site, providing meals and snacks, and thanking them for their work. Other essential responsibilities include community outreach, maintaining a good public image, and promoting the project using social media. Document those responsibilities and ask the assigned person to take ownership of each task. By assigning responsibilities at the beginning, you can save time later, ensure the jobs are done, and let your project committee focus on the overall outcome of your grant-funded project.

Avoid conflicts of interest

Rotary members are leaders within their communities. They may be members of the board of a hospital or owners of a shipping company. While it's important to have community leaders involved in your project, no one with a financial interest in the project may serve on your project committee. Even the appearance of a conflict of interest can interfere with the success of a project. Ask committee members if they have any financial interest in the project and disclose all potential conflicts of interest on your application.

Get expert advice

Rotary members have professional expertise. We apply that knowledge to look at challenges in new ways. We also know when we need to call in an expert. Sponsor project committees could look to any of the following groups for expert advice:

- Qualified club members (e.g., consult a civil engineer for a water project)
- Cooperating organizations that have the technical expertise and resources to help you develop and implement the project • A Rotarian Action Group (RAG) related to your project
- Rotary's staff area of focus managers, who can help you craft grant-eligible project plans and offer guidance on best practices in the areas of focus
- The Cadre of Technical Advisers can offer technical expertise and they evaluate larger grant-funded projects for The Rotary Foundation Trustees

IDENTIFY MEASURABLE OUTCOMES

When you measure your success, you can show that you made a difference. Rotary's reputation as an effective and committed humanitarian service organization depends on your club and the thousands of other clubs that contribute to our global impact. We want to measure the good we do in the world, so we've built it into our global grant requirements. Quantifying your impact also makes it easier to publicize what you've accomplished.

Here's how you can get started:

Consider the outcome you want your project to have in the community and how that positive change can be measured. Use the Global Grant Monitoring and Evaluation Plan Supplement to find measurable data points and develop your evaluation plan, which you'll include in your grant application:

- Be specific about who will benefit from your project and what benefits they will receive
- Establish baseline data and set benchmarks to measure your progress during and after the project

- Specify your measurement methods
- · Create a timeline

Budget 5 to 10 percent of project funds to cover evaluation expenses, such as local travel, services rendered by individuals or agencies, and supplies. Because measuring our success is so important, Rotary expects to see evaluation provided for in every global grant budget.

CREATE A FINANCIAL PLAN

Before receiving grant funds, you must develop your financial management plan. Your plan helps you manage funds well, provide oversight, promote transparency, and reduce errors and any misuse of funds.

The financial management plan shows how you will:

- Disburse grant funds properly during project implementation
- Keep thorough financial records
- Manage a club- or district-controlled bank account

Mismanaging funds directly violates The Four-Way Test and Rotary's mission and values. Clubs that mismanage grant funds jeopardize the credibility of Rotary and the Foundation. If funds are misused, the sponsors are responsible for repaying them in full to The Rotary Foundation. The sponsors risk suspension from all Rotary Foundation activities or termination.

Develop a budget

When developing your budget, take into account the goals of the project and the fundraising resources of the sponsors. Make a preliminary budget, discuss how much District Designated Fund (DDF) money and cash are available, and adjust the budget as needed. A detailed, line-item budget must be submitted with the application.

When projecting the cost of goods and services, gather at least three bids or quotes for each major expense to ensure that you receive the highest quality at the best price. During the competitive bidding process, identify any Rotary members associated with a bidding vendor and make sure that the Rotary member is not on the project committee to avoid a conflict of interest. When selecting a vendor, document the reason for your selection and keep records of all bids. You will need to include this information in your application.

RAISE FUNDS

Global grants are a combination of funds raised by the sponsor clubs and matching funds from The Rotary Foundation. These matching funds enable Rotarians to do more thanks to the generous contributions of Rotarians from around the world. Every global grant includes a match of at least \$15,000 from The Rotary Foundation's World Fund, and project budgets are at least \$30,000. The amount of funding you contribute depends on your project's budget and whether you use cash or District Designated Funds. Sponsors can finance global grant projects and activities with:

- District Designated Funds matched 100 percent by the World Fund
- Rotary member cash contributions outright gifts to The Rotary Foundation from Rotary members or funds raised by Rotary members are matched at 50 percent by the World Fund
- Nonmember cash contributions donations to the project account or to The Rotary Foundation from other organizations or parties (not including cooperating organizations or beneficiaries of the project) are eligible to be matched 50 percent by the World Fund

The Rotary Foundation never asks for funding from the community that benefits from a global grant-funded project. Since Rotary members have identified this community as one in need, we don't collect funds from beneficiaries in exchange for receiving the grant or as part of the funds raised by our members to match The Rotary Foundation's grant.

Community ownership is important. When developing a project plan with the community, identify the long-term costs of the project. Sponsor clubs can suggest that community members contribute to a community account to encourage ongoing support of the project and build community ownership, but the collected funds should not cover costs related to the project. Any funds collected from the community should provide additional services (e.g., each household that receives a tube well could be charged \$1 a month to be used for repairs after the grant is closed).

Illustrative Sample:

Source	Entity	Amount USD	%
Cash Contribution Raised by RCPS club members thru' Wealth Mngt Seminar & project specific donations from Non-rotarians	RCPS Host Club	5576	15.37%
	Partner Club	0	0
DDF	District 3131	6000	16.53%
	District 6970	7957	21.93%
50% of Cash Contribution 5576	TRF World Fund Match	2788	7.69%
100% Match of DDF 13957	TRF World Fund Match	13957	38.47%
		36278	

DISTRICT GRANT TIMELINE

NOW! Submit applications online

May 15 Project reports due

online - Final or Progress

June 15 District Grant Applications deadline

June 15-30 Final Review of grants by committee

July 13 District Grant Awards announced

Aug. 1–June 30 Projects completed
 Rotary



APPLY FOR A GLOBAL GRANT

To apply for a global grant, sign in to My Rotary. If you don't have a My Rotary account, follow our guide to create one.

GET STARTED

Discuss your proposed project and funding options with your district Rotary Foundation committee before you begin a global grant application. Your district may be able to provide District Designated Funds or other support or expertise. Rotary's online system will automatically notify your district governor and district Rotary Foundation chair that you're applying for a global grant.

Using the grant application tool

When you and your club are ready to apply, go to the grant application tool on My Rotary. Use the application guide for step-by-step instructions for completing your application. For tips on applying for a vocational training team grant, read the Global Grant Vocational Training Team Member Online Application Process.

The Rotary Foundation accepts applications throughout the year. Give yourself plenty of time to complete the application and get authorizations from the necessary parties. If your project involves international travel, submit your application at least 90 days before it begins.

When you begin the application, you'll first be asked to complete a knowledge check to confirm that the project meets global grant requirements. Within the application, you will be asked to describe:

- The project's objectives
- Its activities
- The project plan and schedule
- Community needs
- Areas of focus
- Cooperating organizations and partners
- Volunteer travel
- Rotarian participation
- The project budget
- Financing

Applications are not reviewed until they are complete, so be sure to provide all the necessary information about your project.

What happens next?

Once your fully completed application has been submitted, it will be reviewed by your regional grants officer and other staff as necessary. Applications that request a match of more than \$50,000 are also reviewed by the Cadre of Technical Advisers. If additional information is needed, your regional grants officer will contact you to get a better understanding of the project, as well as recommending ways to enhance your project plan. Your regional grants officer is your main Rotary contact and will assist you throughout the life of your project.

REVIEWS AND APPROVALS

Club and district officers have different levels of access to your grant application. Some are required to approve the project in the application tool at certain stages of review.

This table shows who in both sponsors' clubs and districts can see and edit your application and their role in the review.

	View application	Edit application	Authorize application		
Primary project contact	✓	✓	✓		
Club president	/	✓	/		
Club treasurer	/				
District Rotary	./	./	_/		
Foundation chair	V	V	V		
District governor	/	✓	✓		
District stewardship subcommittee chair	/	✓			
District grants subcommittee	✓	✓			
District scholarship subcommittee chair	√	✓			
*Signs legal agreement after application is approved by Rotary					
**Only if District Designated Funds are used for the grant					

Typical Reasons for GRANT denials by TRF

If your grant application doesn't meet global grant criteria, your regional grants officer will work with you to make the changes needed to meet them. If you and your partner club can't make these changes, your project will not be eligible for global grant funding.

Grant applications are most often denied because:

- The project doesn't fit any of Rotary's areas of focus
- The project isn't sustainable
- The project benefits another organization's programs
- A club partner has reached 10 open grants, the maximum number
- A club partner is not current on its reporting on other grants
- Global Grant Application Links
- https://www.rotary.org/myrotary/en
- https://www.rotary.org/myrotary/en/take-action/apply-grants/global-grants
- https://grants.rotary.org/s main.jsp?lang=1

IMPLEMENT, MONITOR, AND EVALUATE YOUR PROJECT

PROJECT IMPLEMENTATION

It's crucial that you implement your project according to your project plan, because all of your partners and The Rotary Foundation have agreed upon it and are working within that plan. If challenges arise, communicate with all involved parties to address them promptly and collaboratively. Any changes to your plan must be approved by your regional grants officer.

As you carry out your project, keep reviewing your project plan with your project committee and team. Measure the project's success and get feedback from community members about its activities. Delegate tasks and regularly check in with club partners, cooperating organizations, and the community to identify and resolve issues before they threaten the success of your project. You should also provide regular updates to your fellow club members.

It's best to have an email list with the following people: all grant sponsors, cooperating organizations, involved community members, club members, and other interested parties. Keep everyone informed of progress, challenges, and solutions throughout the life of your project.

At a minimum, the host and international sponsors must:

- Communicate with each other and the benefiting community regularly about the grant-funded project
- Contact their regional grants officer as soon as questions arise
- Get preapproval from each other and Rotary for any changes to the project's scope or budget
- Report to the Foundation every twelve months

MONITORING AND EVALUATION

Monitoring is the continual process of collecting specific data, and it uses the measures and benchmarks you outlined in your grant application to track the progress of your project. Evaluation is an assessment of how well your project is achieving its objectives. Together, they help you understand how to improve your project by examining its strengths and weaknesses and assessing its achievements in the short and long term.

You'll monitor the project from start to finish. This keeps the project on track by reminding everyone of its desired impact and checking that the activities taking place are resulting in measurable progress toward that goal. When problems are discovered, you can resolve them quickly, learn from them, and adjust your approach to the rest of the project. Integrate what you learn into your future projects to increase sustainability and success, and share your experience with other Rotary members.

The monitoring and evaluation supplement includes definitions of Rotary's terminology and a sample monitoring plan that you can customize to your project. The scholarships supplement includes additional recommendations for monitoring global grant scholarships.

FINANCIAL TRANSPARENCY

The financial management plan you develop during project planning helps you keep track of grant funds, promotes transparency to all involved, and safeguards against misuse. It also facilitates reporting. The financial management plan is a guide for recordkeeping.

Keeping track of finances and overall progress will help you monitor your budget, evaluate your success after the project is completed, and have all of your project information ready for grant reporting. Make sure everyone involved in the project keeps receipts, financial documents, and communications.

Open a bank account

The Rotary Foundation recommends that grant funds be managed by the host sponsor club, unless there is a reasonable business purpose for managing the funds internationally.

The sponsor club should maintain a club-controlled bank account that is used solely for receiving and disbursing Foundation grant funds. Each open grant should have its own account. Grants are not intended to produce interest income for clubs, so keep grant funds in a lowinterest or non-interest-bearing account. A checking account allows for flexibility in making the multiple disbursements that may be needed for grant transactions and ensures that bank statements will be available. The name on the account should identify the club, and two Rotary member signatories (payees) should be required for all transactions.

Have a succession plan for transferring control of the project bank account in case a signatory becomes unable to perform his or her duties. If account signatories change, be sure to notify your grants officer.

Follow local laws

While The Rotary Foundation attempts to follow international guidelines, laws in some countries and regions may be more stringent than Foundation requirements. It is the responsibility of both international and host sponsors to be aware of and comply with local laws. Conversely, if local laws are less stringent, the club must still meet Foundation requirements.

Situations in which local laws are not compatible with Foundation requirements (e.g., regarding bank account naming) are handled case by case. Contact your payment coordinator for more information.

Transfer and disbursement of funds

After your global grant application is approved, your club must complete the payment requirements outlined in the approval notification, including:

- Provide the project bank account's information
- Name two Rotary members as signatories
- Sign the global grant legal agreement
- Submit cash contributions to The Rotary Foundation or deposit them directly into the project account

The approval notification also provides important information about making travel arrangements and getting travel insurance, in addition to the most up-to-date terms and conditions of your grant.

The Foundation sometimes pays large grant awards in installments, depending on the project's spending and implementation plan. The funds must be managed and distributed by a club; they may not be turned over to non-Rotary partners or entities to disburse. If a partner organization incurs expenses, the club should be reimbursing it from the project account after receiving a receipt.

If more than \$500 of grant funds remains unused, you're required to return the money to The Rotary Foundation. It will be credited to the World Fund, except when countries do not allow that.

Grant agreements are made only between the Foundation and clubs, and they are subject to the laws of the State of Illinois (because The Rotary Foundation is an Illinois corporation) and of the United States. Grant sponsors are also expected to follow their own countries' laws.

Keep financial records

Follow your spending plan to use grant funds for their stated purposes and in a timely manner, and keep detailed records as you do so. For most grants, a single-entry financial journal or ledger is a sufficient accounting method.

Pay project-related expenditures by check or another traceable method. Keep original receipts for all expenditures above \$75. If one person makes electronic payments, keep paper records showing that the payment was approved by both signatories. Save detailed receipts, and record transactions in a ledger. For each transaction, the ledger should note the date, the amount, and the reason for the transaction. Transactions may include income, such as interest earned and recoveries.

Cash transactions are strongly discouraged, but if they can't be avoided, maintain a receipt book confirming cash payments, with all receipts made out to the club and signed by the vendor or service provider. All cash transactions must be approved by both sponsors. You can use signed vouchers to document them.

Below is an example of how Rotary sponsors can track the flow of a project's funds, by budget category, through its bank account and petty cash. Every transaction should be recorded.

Retain documents

Maintain detailed records to comply with the club MOU, local laws, and standard business practices. Make copies of all documents so that project activities can continue uninterrupted if there is a fire or other catastrophe. If local laws require you to submit original information to the Foundation, it is still necessary to keep copies of these documents.

KEEP THESE DOCUMENTS FOR YOUR RECORDS:

All grant correspondence, including email

Beneficiary documentation, including: -

- The community assessment
- Any cooperating organization memoranda of understanding

Vendor documentation, including:

- Quotes
- Contracts

Grant-related documentation, including:

- Scholar and vocational training agreements
- Receipts and invoices
- Bank statements and other financial documentation
- Inventory
- Photos

Retain all documents required by the club MOU in a location that is known and accessible to more than one person. Keep all original grant-related documents, statements, and receipts for a minimum of five years after the grant is closed, or longer if required by local law. Scholars and vocational training team members need to submit receipts for expenses of \$75 or more that are covered by your grant budget.

Track inventory

Establish an inventory system to track equipment and other assets purchased, produced, or distributed through the grant, identifying the person or entity that possesses the items. Rotary clubs are not allowed ownership of grant assets; all grant assets must legally belong to grant beneficiaries. A record of where grant assets are located also helps both the sponsors and the community even after project implementation. For example, because deep tube wells are susceptible to geological changes that increase the chance of arsenic contamination, it may be necessary for the government to periodically locate these wells to test water quality. For sustainability, purchase equipment and other goods locally, if possible, and in consultation with the benefiting community, so that it can be operated, maintained, and repaired even after the project is completed.

REVIEWS, VISITS, AND AUDITS

In addition to providing technical assistance to Rotary members, the Foundation's Cadre of Technical Advisers also evaluates global grant funded projects for the Foundation's Board of Trustees. The cadre may conduct these types of evaluations:

- Technical review An evaluation of the technical feasibility of a project, based on the application and done only during the application review period; does not include a site visit or communication with the project sponsors
- Site visits On-site evaluation of the technical feasibility of a proposed project by an advance site visitor, of the implementation of an ongoing project by an interim monitor, or of the impact of a completed project by a post-project monitor
- Audits An evaluation of the financial management and oversight of grant funds, in which a cadre
 member meets on-site with the project sponsors and the benefiting community; The Rotary Foundation
 conducts audits randomly each year to ensure that grant funding is used as approved

Review Process by Grant Award Size						
	Technical review	Interim site visit	Advance site visit	Approval by Trustees		
\$15,000-\$50,000	(depends on technical difficulty)					
\$50,001- \$100,000	/	/				
\$100,001- \$200,000	/	/	/	√		

Grants used exclusively for a vocational training team or scholarship are exempt from these requirements.

For more detail on how the cadre evaluates projects, read the Terms and Conditions for Rotary Foundation District Grants and Global Grants.

REPORT YOUR PROGRESS AND OUTCOME

REPORTING REQUIREMENTS

Both host and international sponsors are responsible for reporting on the use of grant funds. Grant reports are submitted online through the global grant application tool. The report asks questions about progress toward achieving your objectives, how Rotarians are participating in the project, expenditures and financial management, and more.

Reporting timeline

You'll submit a project report within 12 months of receiving the first grant payment and every 12 months thereafter while the project is active. Final reports are due within two months of project completion. For details on how to submit a report and what to include, read the guide on reporting on global grants.

You will see all your due dates for grant reports listed in the online system. Two months before a grant report is due, the primary sponsor will receive a reminder email. If a grant report is overdue, Rotary contacts sponsors to remind them to submit their required reports or risk club termination.

Zone, district, and club leaders receive copies of the letters to alert them to any problems and to allow them to work together to fulfill the reporting requirements. Grant sponsors that have overdue reports will not be awarded new grants until all previous reporting requirements are fulfilled.

For grants that support scholars and vocational training teams, the sponsors are responsible for the use of grant funds by scholars and team members and for reporting to the Foundation. Inform scholars or team members of your responsibilities and maintain regular contact with them to ensure that grant funds are being spent as approved. For more information, see the global grant scholarships supplement.

Your final report

The final report will ask for information on all aspects of your project, as well as its outcome.

Humanitarian Project Reporting Requirements

- Purpose of the project
- Project goals
- Evaluation of goals and how they addressed the areas of focus
- Results of your monitoring and evaluation plan and who collected the measurements
- Description of how sponsors were involved in the grant
- Number of project beneficiaries and how they benefited
- Itemization of how the funds were spent, including identity of vendors
- Role of cooperating organizations, if any
- Bank statement indicating that the account is closed (if it is a project specific account) or that all grant funds and interest were spent

Additional Reporting Submitted by Scholar

- List of coursework, research, and service activities you completed
- Description of the impact the studies had on your future professional goals
- Description of your interaction with local Rotarians and community

Additional Reporting Submitted by Vocational Training Team Leader

- Method, schedule, beneficiaries, and results of the vocational training
- Statement on whether the vocational training met your and beneficiaries' expectations
- Description of your specific role on the vocational training team and the activities carried out during training

Example of a Progress Report

Global Grant Record - GG1414265

Grant Title - Positive Dental & Health Project for Rural Students around Pune

Report Type - Progress

Report Status - Accepted

Host District - 3131

International District - 6970

WELCOME TO THE GLOBAL GRANT REPORT

Your answers to the questions in this report will help us measure Rotary's impact in the world, publicize your successful activities, and document your good stewardship practices. Thank you for taking your time to complete this report carefully and accurately.

Objectives

Your global grant was approved to fund the following activity(ies):

Humanitarian project

Rate your progress toward achieving your project's objectives:

Excellent

If no progress has been achieved to date, explain why.

Have the objectives been modified?

No

If yes, explain how and why.

List your project activities to date. In your description, tell us where the activity took place, who participated, and what has been accomplished.

No.	Activity	Description	Status	Completion Date
1:	Equipment/supply purchase	Medical Van with dental chair all the necessary supporting infrastructure is ready for operations.	Complete	05/06/2015

Liet the activities you plan to initiate during the next 12 months

Status of Global Grant No 1414265

Equipment / other items procurement Status

Item of Procurement

Mobile Dental & Diagnostic Vehicle Vehicles displays Grant No, Host & Partner Club & both District Names with Rotary Wheel on all sides



Dental Chair with Dental Accessories, Diagnostic Tools & Accessories already fitted & functionally commissioned.



Diagnostics tools, Consumables and accessories also have been procured.

Status

Major work completed. Functionally working Dental & Diagnostic Vehicle handed over to Kolumbus - Partners in Service. DG Vivek Arhana & IPDG Dr Deepak Shikarpur 3131 Inaugurated this Project



DG Vivek handing over the Vehicle keys to Kolumbus Partners in Service



Progress Reviews Participation by Rtn Sunil Misra &



Teacher's Training Workshop

 Participative Teacher's Training Workshop has been completed covering areas Vision, Dental, Anemia & Nutrition, Skin, Ear-Nose & Learning Disabilities. The complete event has been digitally recorded and DVDs are being given to Teachers along with Screening Tool Kits for repetitive viewing



POSITIVE HEALTH TRAINERS: DOCTORS



Rtn Dr Deepashree

Sathe Dentist

Dr Shobha Rao, Nutrition Expert

Dr Sameer Kulkarni **ENT Consultant** Surgeon



Paediatrician







- A Ready Reckoner Contents being developed
- Teacher's Primary Screening Tool Kits being procured.
- Refreshing Camps Planned during June after which Primary Health Screening by teachers is expected to begin

Actual Work has already begun...



Student's Health Book at Vidva-Vardhini





Rtn Deepashree conducting dental check Ups at both schools









PUBLIC IMAGE ENHANCEMENT

Successful implementation of Global Grant Project with sustained benefits reaching local community is one of the best ways to enhance Public Image of Rotary.

Make Sure that at major milestone achievements of the project the local community, community leadership along with involved Rotarians are present. Acknowledging the efforts of the local volunteers is necessary to keep them motivated.

Such events should be reported along with images showing beneficiaries, banner displaying Global Grant Numbers and involved local organizations. Should be released for public consumption to local news media as also published using social networks.

The community & news media has already welcomed this project and reported in news print-media resulting into a good PR for Rotary.

Rotary Club launches health campaign



The students of Chandraficant Darode School undergoing a deptal check-up at the medical van of the Rotary Chibo of Shivajingar in Pune on Wednesday.

ST CORRESPONDENT

Shivajinagar: The Rotary Club of Shivajinagar has launched a positive dental and health campaign in and around Pune.

The camplaign mainly focases on the health aspects of under-privileged classes which includes a nurjority of girls.

Under this programme, a well-equipped medical van has been made available for the needy ones. The medical van offers facility of ECG, eye check-up and portable X-ray

The medical van was at Chandrakant Darode School near BMCC Road on Tuesday for carrying out health check-ups of the school students free of cost.

The students underwent eye, haemoglobin and dental check-ups. Anjali, wife of the President of Rotary Club of Shivajinagar, Dr Satish Ravetkar was present at the health check-up of the students. She said that due to lack of education in rural areas, the children and their parents are unaware of the medical assistance that they needed.

"Hence, this van would help spread awareness among the rural people and they can avail of the required assistance," she added. Rotary Club officials said children with serious bealth problems will be shortlisted for further treatment.

EXTRA SUPPORT

The District Leadership at RID 3131 visualizes following focused methods of fund raising to enhance number of global grants as well as participating clubs.

- Global Grant funded by Term Gift (> 30000 USD)
- Global Grant funded by CSR Funds (> 20000 USD)
- ➤ Global Grants where Cash Contribution is pooled in (USD 2000 each) by multiple small / new clubs
- > Global Grants where Cash Contribution is raised by a single club (USD 5000 and above)

The true strength of Rotary comes from our relationships and shared knowledge. When we need extra support or ideas, we can rely on district and zone leaders, Rotary specialists, and each other to find solutions.

if you could use help with a grant application, project, or activities, try these resources:

District Rotary Foundation Global Grants Committee — The members of your district Rotary Foundation committee can offer advice and guidance throughout your grant.

For RID 3131 for Rotary Year 2016-17 you can connect with

- Shirish Karnik, Director
- Vinay Sathe, Co-Director
- Parag Muley, Co-Director

Contact Details

Director	Global Grants	Shirish Karnik	Unitedring@yahoo.co.in	9822022277
Co-Director	Global Grants	Vinay Sathe	vinay.rotary@gmail.com	9860822242
Co-Director	Global Grants	Parag Mulye	parag.mulye@gmail.com	98909 96660
Director	Corporate Promotion & Special Grant Projects#	Rakesh Bhargava	rcpc.president.2013@gmail.com	9823051623
Director	Global Grants Education Program	Arun Sathe	Av sathe@vsnl.net	9960050055

Special Global Grant Projects with Term Gifts (>30,000 USD) & CSR funds (>20,000 USD)

Please feel free to connect with us on email / cell phone

Everything you need to know about Global Grants through YOUR MEMBER ACCESS at

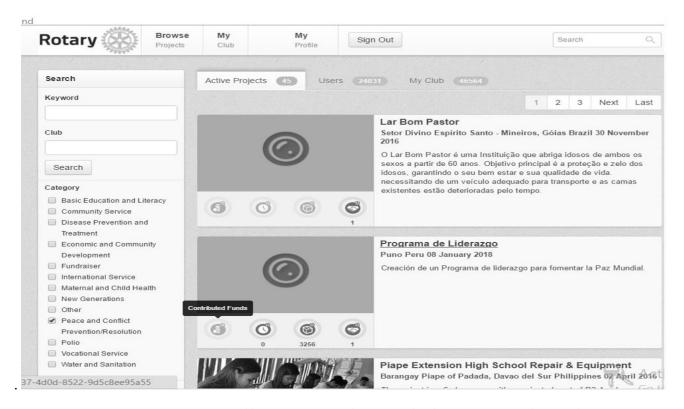
https://www.rotary.org/myrotary/en/take-action/apply-grants/global-grants

Rotary Showcase https://www.rotary.org/showcase

to share your success or look for ideas you can apply to your own project. 1000-EN—(1015)



Rotary Ideas http://ideas.rotary.org/Project/Find Find potential grant partners or post your project needs



Rotary Grants discussion group https://www.rotary.org/myrotary/en/exchange-ideas/groups/my

Share ideas, ask questions, and get advice from other Rotary members.

Acknowledgements

- Motivating support from DGE Prashant Deshmukh
- Guidance by District Trainer & DRFCE PDG Dr Deepak Shikarpur
- Experience sharing by many Rotarians about their global grant projects
- A very detailed comprehensive Guide created by RI: TAKE ACTION: 2016 edition (www.rotary.org/grants)